CAMPING TRENDS IN BRITISH COLUMBIA: 1980 - 1990

A SUMMARY

PROVINCE OF BRITISH COLUMBIA
MINISTRY OF ENVIRONMENT, LANDS and PARKS
BC Parks
Research Services
December, 1991

BC
92-03814/
P291R47
I:C266
1991
c.3

Canadian Cataloguing in Publication Data
Main entry under title:
Camping trends in British Columbia, 1980-1990

ISBN 0-7726-1494-6

1. Camp sites, facilities, etc. - British Columbia - Statistics. 2. Camping - British Columbia - Statistics. 3. Tourist trade - British Columbia - Statistics. I. BC Parks. Research Services.

GV191.46.B7C35 1992 338.4'76479471109 C92-092075-6

SUMMARY REPORT

One of the major forms of overnight accommodation in British Columbia is public and private campgrounds. It is estimated that provincial park campgrounds account for about one-quarter of all campsites in the Province. To help identify where the campground industry in British Columbia is heading, BC Parks undertook a review of camping trends in British Columbia in 1986.[1]

This Summary Report provides an update of these camping trends in British Columbia. It is based primarily on data from the Canadian Travel Survey which is conducted every two years by Statistics Canada. The following results are presented in two sections:

* Market Characteristics

* Camping Expenditures

More detailed statistical tables are available from Research Services, Park Management Services Branch, BC Parks.

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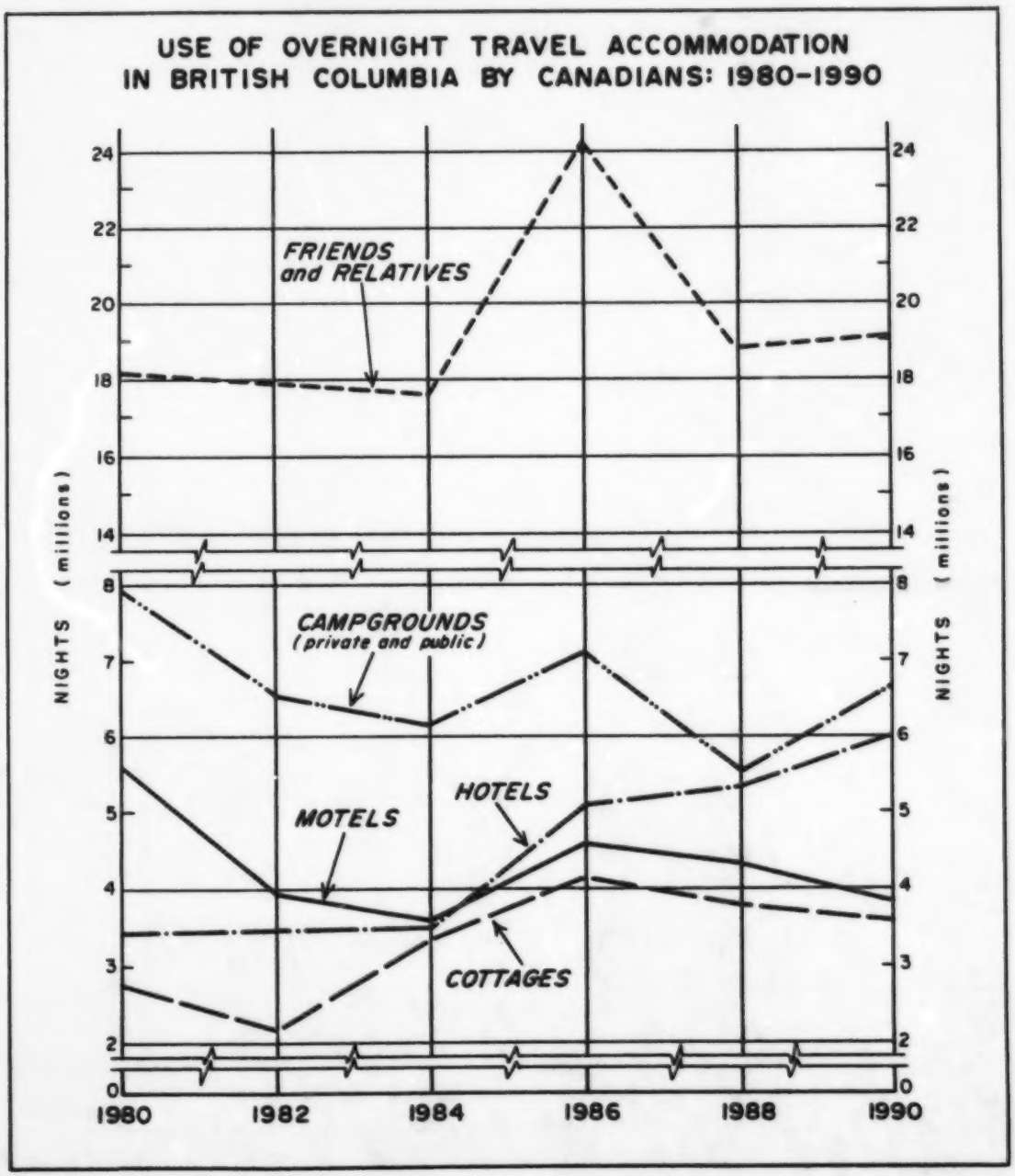
[1] Other efforts to monitor these trends were published in a report entitled Camping in British Columbia: Recent Trends (September, 1986) and in papers entitled "Camping Trends in British Columbia: The Canadian Camper Market" (November, 1988) and "Camping Trends in British Columbia: The 1980's" (January 1990).

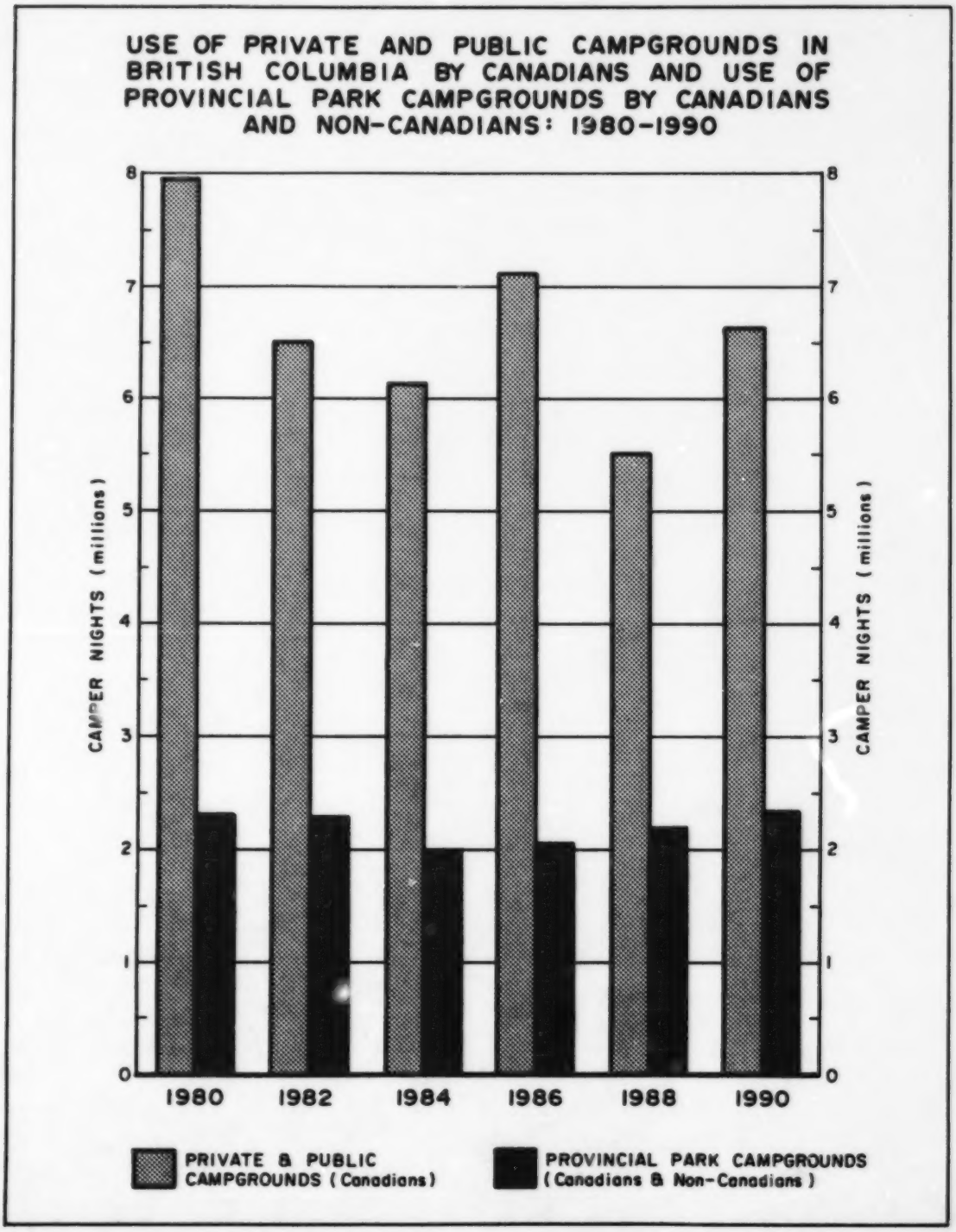
MARKET CHARACTERISTICS

1. In 1990, the campground accommodation sector (both private and public campgrounds) continued to account for the second largest number of travel nights spent in British Columbia by Canadians. This accommodation sector accounted for about 6.6 million or 17 percent of the total 39.3 million nights spent in British Columbia.

1990 marked the first increase, with the exception of 1986 (Expo year), in the use of campgrounds since 1980. The use of hotels increased gradually during the 1980's and again showed an increase in 1990.

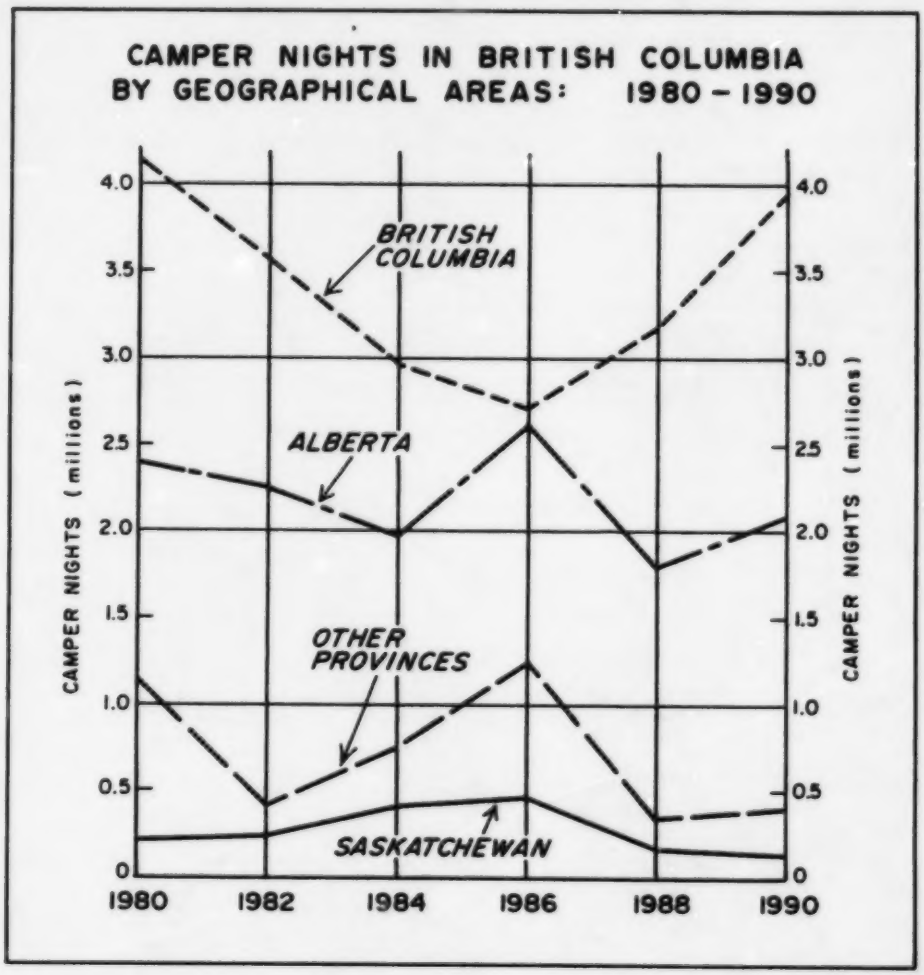


2. The number of camper nights spent in **provincial park campgrounds** by Canadians and non-Canadians fell steadily (15%) from 1980 to 1984 and from 1986 to 1990 increased 16% to reach the same level of camper nights recorded in 1980.



3. Geographically, British Columbians accounted for the largest number of camper nights spent in British Columbia in 1990 (60%).

From 1980 to 1986, camper nights spent in the province by British Columbians fell by 35 percent. After Expo '86, camper nights generated by British Columbians went up 46 percent (from 2.7 in million nights in 1986 to nearly 4.0 million nights in 1990), while camper nights generated by all other Canadians dropped by almost 39 percent (from about 4.3 million nights in 1986 to 2.6 million nights in 1990).

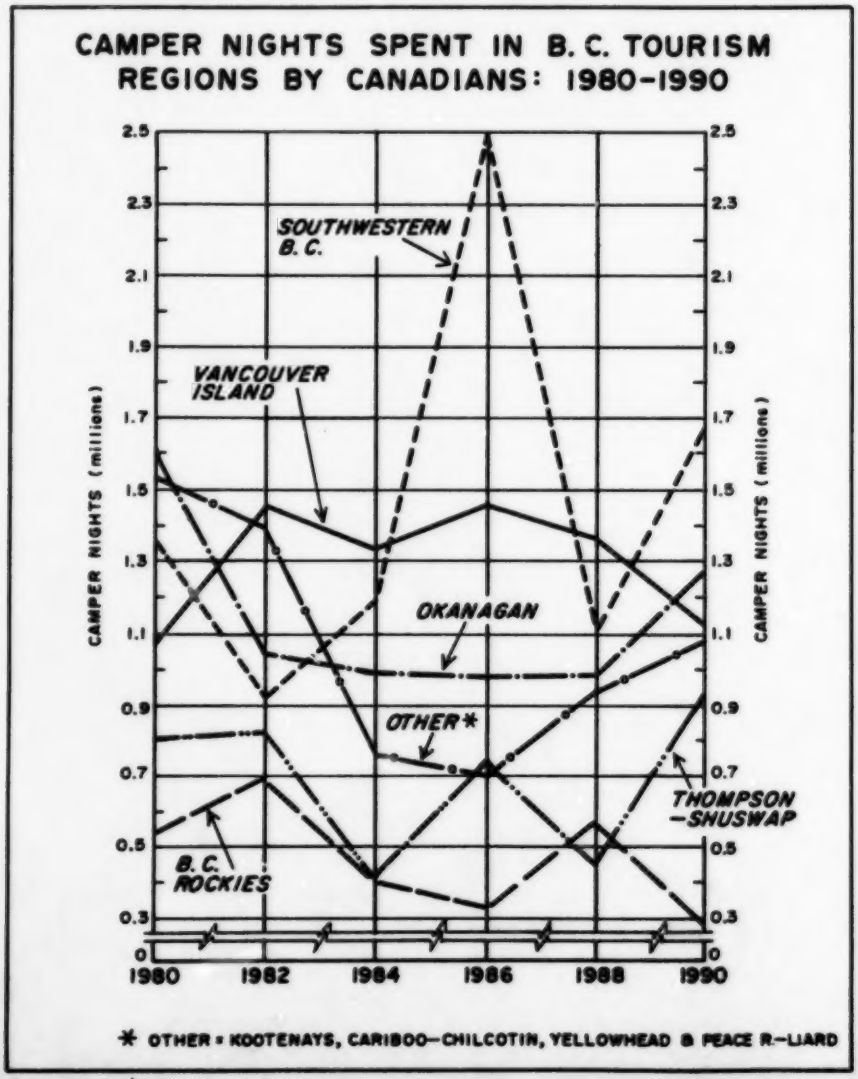


4. In 1980, the three British Columbian tourism regions recording the greatest number of camper nights were: the Okanagan (1.6 million nights); Southwestern British Columbia (1.4 million nights); and Vancouver Island (1.1 million nights). Together these tourism regions accounted for about 58 percent of total camper nights spent in British Columbia in 1980.

By 1990, the three tourism regions recording the greatest number of camper nights remained unchanged with the exception of a shift in their rank order. Southwestern B.C. led with 1.7 million nights, followed by Okanagan with 1.3 million nights and Vancouver Island with 1.1 million nights. These three regions accounted for nearly two-thirds of total camper nights in 1990, increasing their market share of camper nights from 58 to 64 percent.

During the Expo year (1986), there was a very sharp increase in camper nights in the Southwestern tourism region. Modest increases also occurred in the Thompson/Shuswap and Vancouver Island regions.

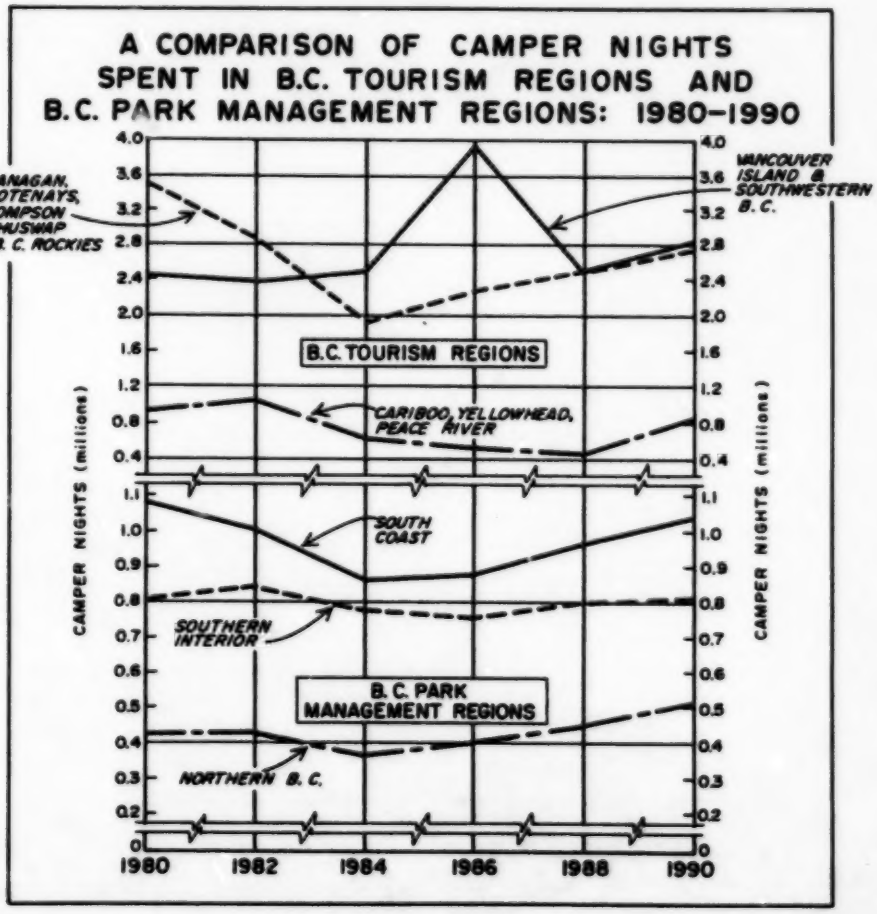
Comparing 1988 to 1990, increases were noted in total camper nights in all tourism regions except the Vancouver Island and B.C. Rockies regions.



5. Several patterns emerge when camper nights are compared between the B.C. Tourism and the B.C. Park Management regions. First, during Expo (1986) camping went up sharply in the Vancouver Island/Southwestern B.C. Tourism region (a 58% increase over 1984) while it went up only marginally in the South Coast Park Management region (a 1% increase over 1984). Even though there was a gradual increase in camper nights in the South Coast Park Management region from 1984 to 1990, the region did not quite recover the number of camper nights it recorded in 1980 (the 1990 camper night total is still 5% below that recorded in 1980).

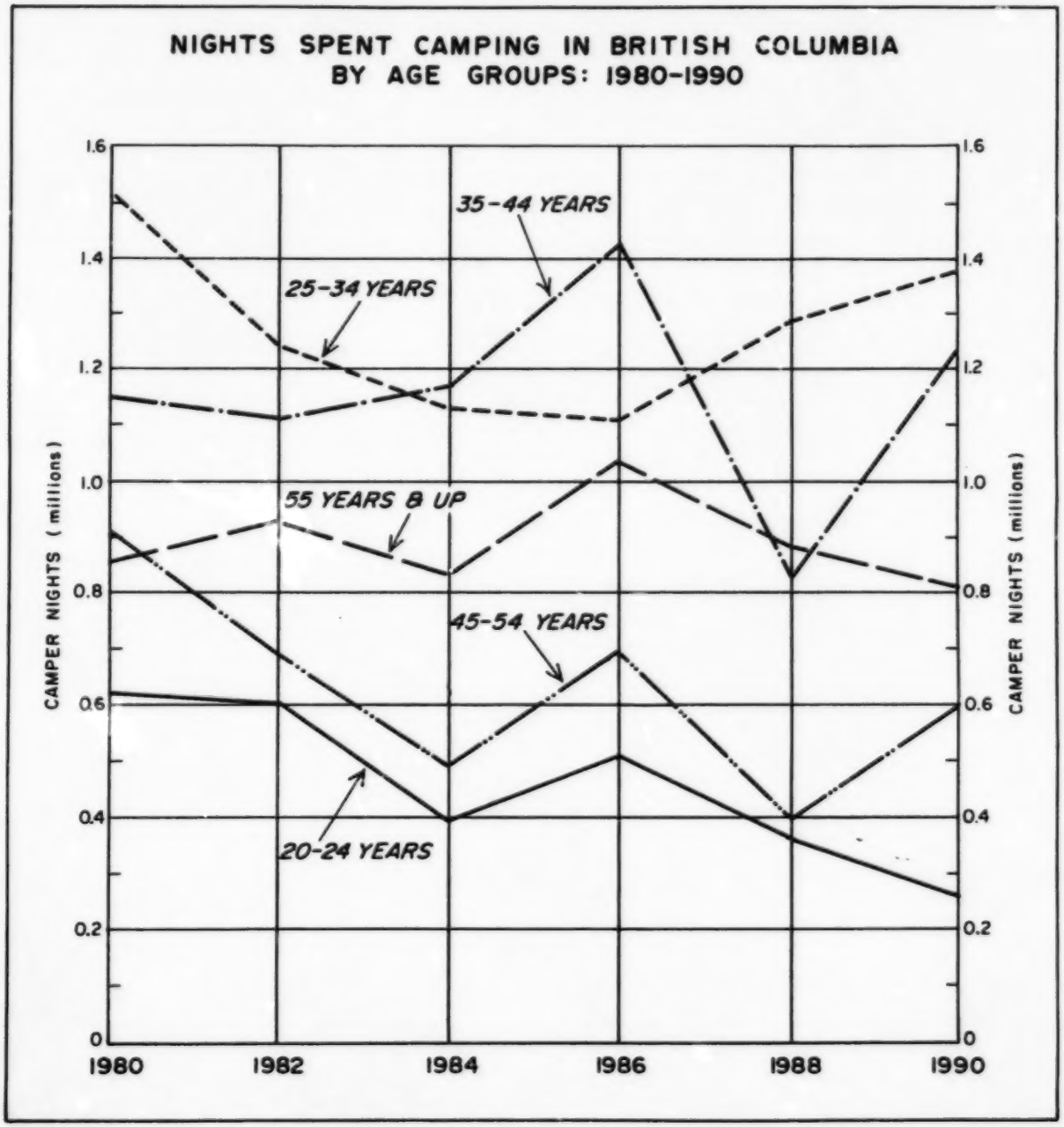
Second, camper nights in Southern Interior Park Management region remained fairly stable during the 1980's and into 1990. By contrast, camper nights in the Okanagan, Kootenay, Thompson/Shuswap and B.C. Rockies tourism regions fell quite sharply from 1980 to 1984 and then increased gradually from 1984 to 1990.

Third, camper nights in the Cariboo, Yellowhead and Peace River tourism regions fell gradually from 1982 to 1988 with the first increase noted in 1990. In comparison, camper nights in the Northern B.C. Park Management region fell slightly from 1980 to 1984 and then showed an earlier recovery then the corresponding tourism regions with camper nights increasing 45 percent between 1984 and 1990.



6. The age groups which generated the highest number of camper nights in 1990 were those between 25-34 and 35-44 years of age.

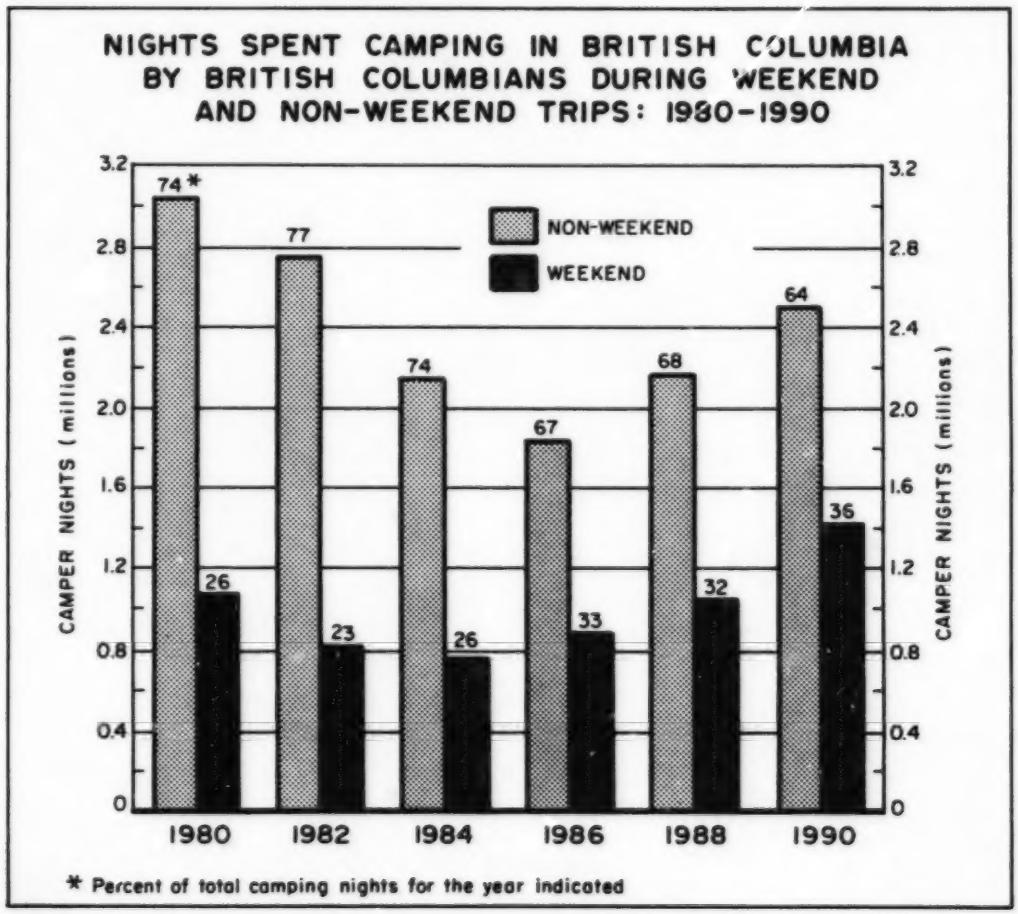
For the first time, with the exception of the Expo year, camping in British Columbia by those in their "mid-life" years (45-54 years of age) increased, while camping by younger Canadians (20-24 years) continued to decline.



7. During the 1980's, the greatest declines in camper nights spent in British Columbia by residents occurred during non-weekend camping trips.

Camper nights on non-weekend camping trips fell by 40 percent from 1980 to 1986. Comparing 1986 to 1990, however, shows a 38 percent increase in camper nights generated during non-weekend camping trips and an increase of 62 percent in camper nights generated on weekend trips. 1990 camper nights spent on weekend trips show an increase of 33 percent over those recorded in 1980, while camper nights spent on non-weekend trips remain 18 percent below the 1980 total.

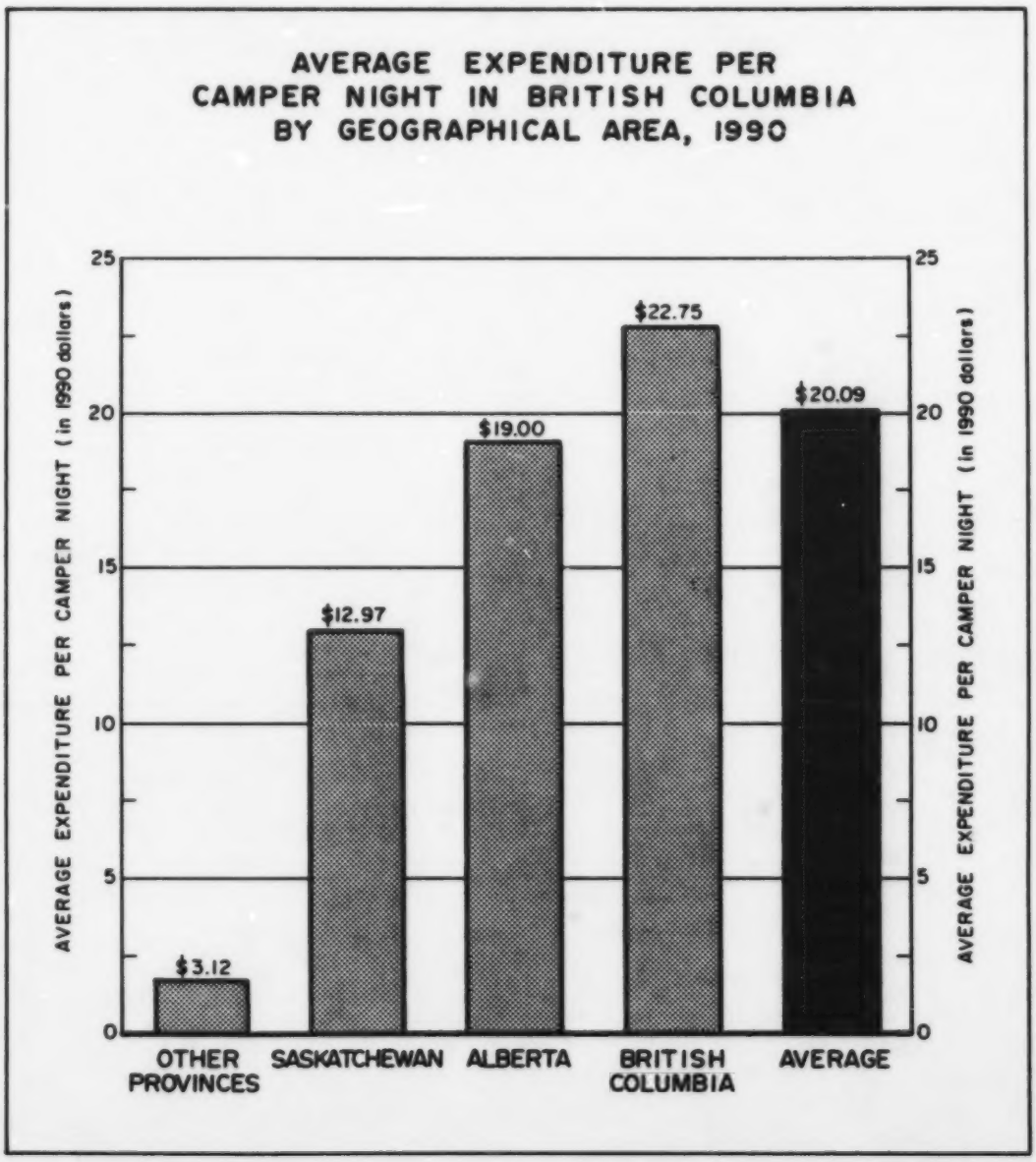
The proportion of camper nights spent on non-weekend trips gradually decreased (with the exception of 1988) from 1980 through 1990, while weekend trips grew proportionally from 26 percent to 36 percent of total camper nights.



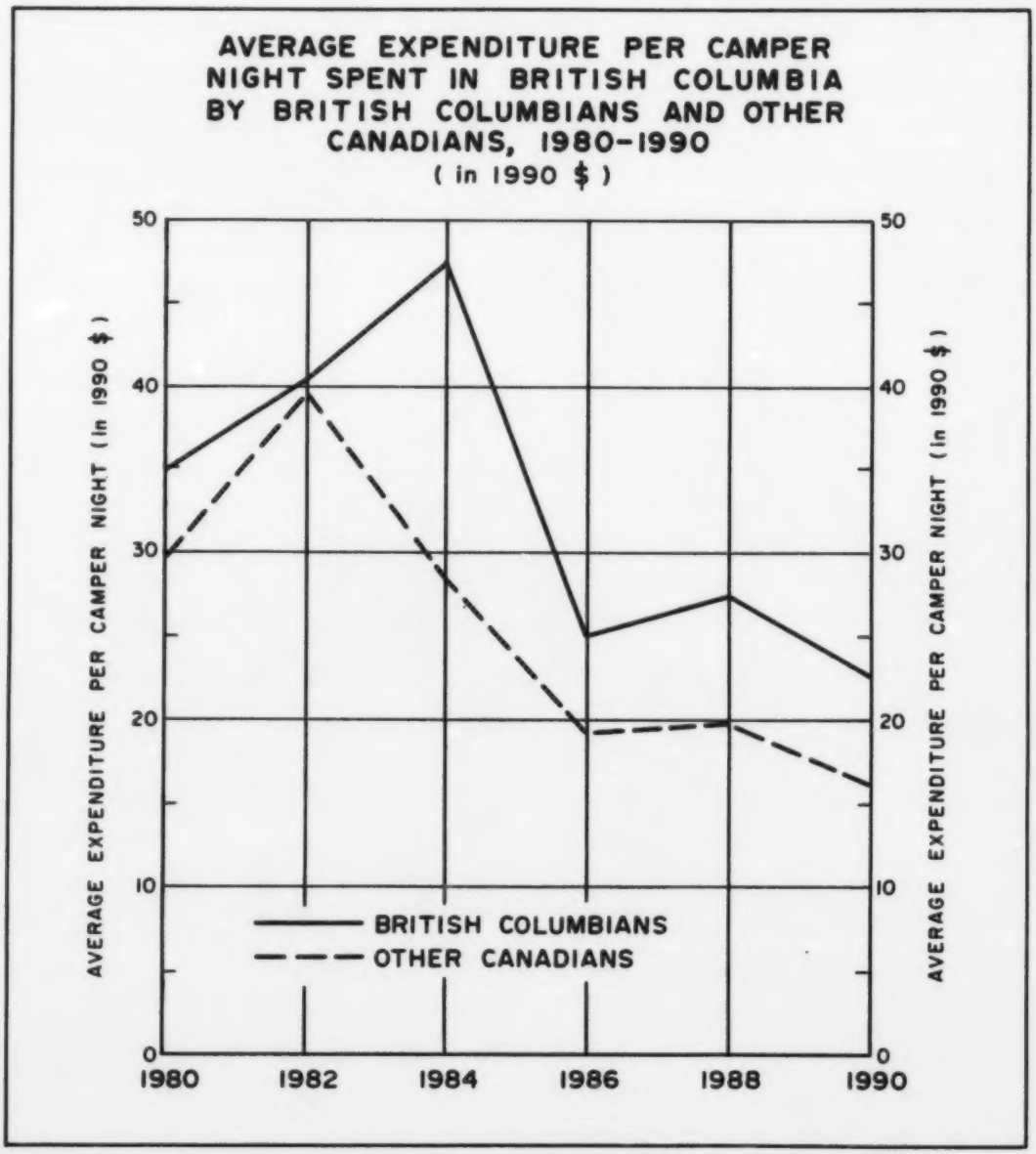
CAMPING EXPENDITURES

8. In 1990, the average expenditure per camper night by Canadians camping in British Columbia was $20.09

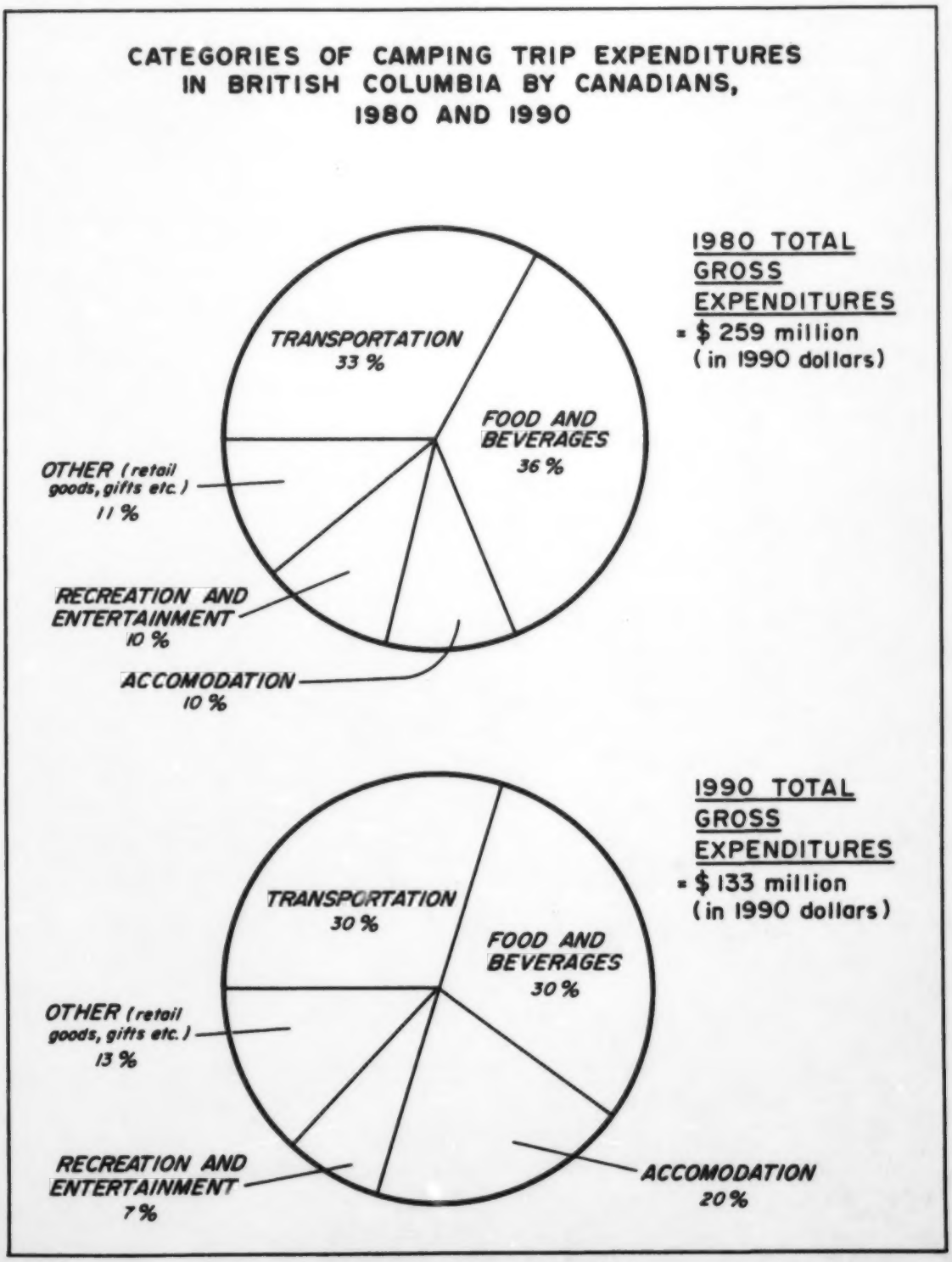
British Columbians tended to spend more per camper night than did other Canadians who camped in British Columbia. In fact, the further people travelled to camp in British Columbia, the less they spent per camper night.



9. The average expenditure per camper night by both British Columbians and other Canadians has decreased steadily since 1984 and 1982 respectively. Average expenditure per camper night by British Columbians fell from $47.38 in 1984 to $22.75 in 1990, a decrease of almost 52%. Comparing the average expenditure per camper night of other Canadians for 1982 and 1991 shows a decrease of 59%.

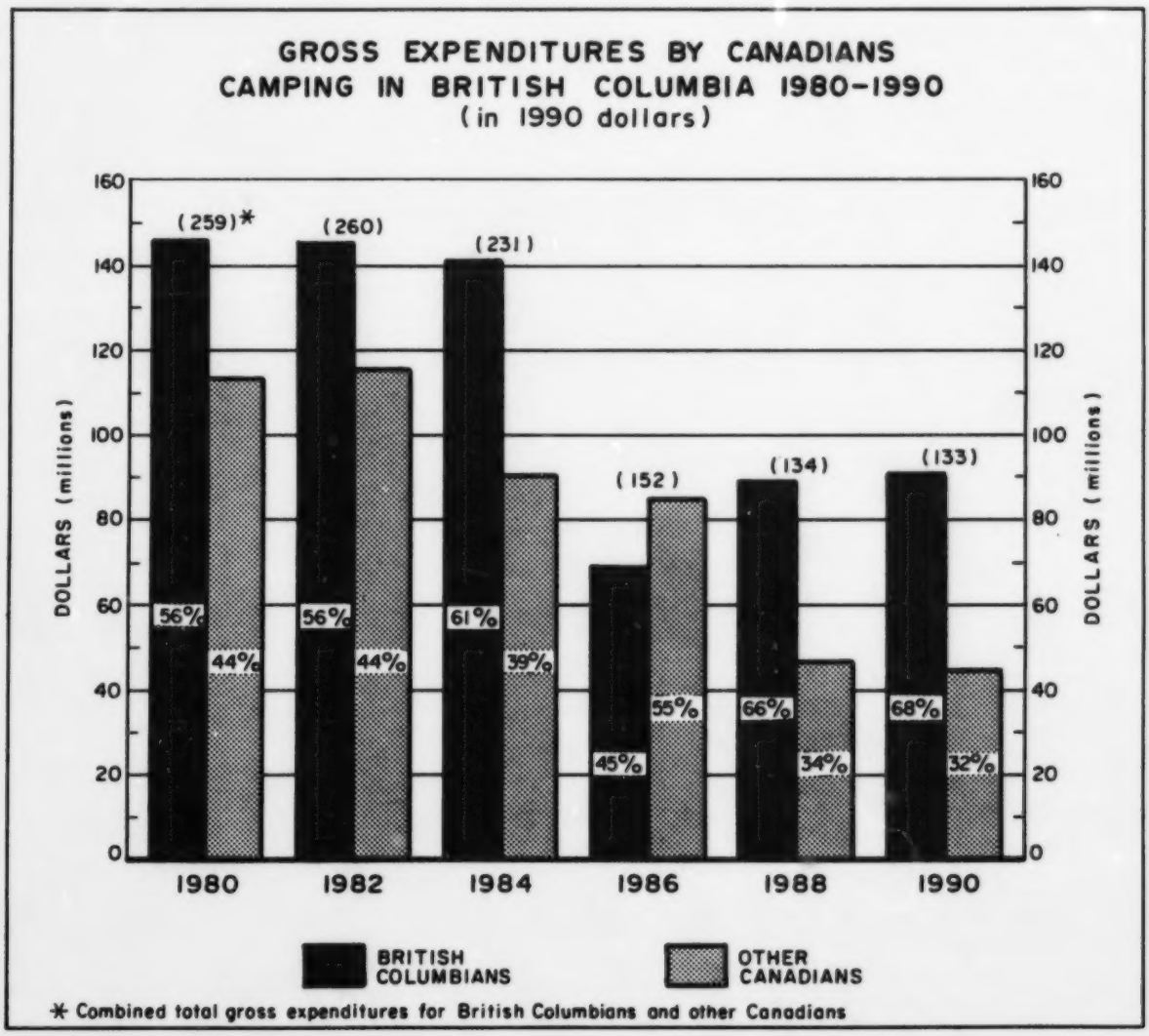


10. The percent of camping trip expenditures spent on camping accommodation doubled from 1980 (10%) to 1990 (20%). The largest percent decrease in camping trip expenditures was noted in the food and beverages category.



11. Gross expenditures by Canadians camping in British Columbia fell from $259 million in 1980 to $133 million in 1990 -- a decrease of about $126 million (i.e. in 1990 dollars) or a drop of about 49 percent.

Except for the 1986 Expo year, camping expenditures by British Columbia residents have accounted for an increasing proportion of gross camping expenditures in the province. In 1990, British Columbians accounted for about $90 million or 68 percent of total gross expenditures spent during camping trips in British Columbia, while other Canadians accounted for $43 million or 32 percent of total gross expenditures.



CONCLUSIONS

Several conclusions can be drawn from these results. First, campgrounds are one of the major forms of overnight accommodation in British Columbia, accounting for the second largest number of travel nights spent in British Columbia by Canadians (6.6 million camper nights).

Second, 1990 marked the first increase, with the exception of the 1986 Expo year, in the use of public and private campgrounds in British Columbia in the last decade. Despite this increase, the 1990 camper night total is still 17 percent below that recorded in 1980. On a provincial scale, much of the overall decline in camping in British Columbia has been generated by British Columbians. Use of campgrounds by British Columbians has declined by 222,000 camper nights (1990 compared to 1980). However, combining all remaining provinces' camper night contributions shows a decline of 1.1 million camper nights for the same period.

Third, camping in the Expo year (1986) resulted in a major exception to the overall camping trend in British Columbia. Statistics suggest that Expo may have had a much greater positive effect on use levels in the private campground sector than in the public campground sector. One possible reason for the positive impact in the use levels of the private campground sector during Expo '86 may be the fact that many private campgrounds have an advance reservation system while most public campgrounds do not have such a system.

Fourth, the past decade has seen a decline in both the number and proportion of camper nights generated by non-weekend trips. Correspondingly, the proportion of camper nights resulting from weekend trips has increased from 26 percent in 1980 to 36% in 1990, while the actual number of nights is 33 percent (353,000 camper nights) greater than that recorded in 1980. This shift in type of trip, weekend versus non-weekend, may have been a factor in the decrease noted in the total gross revenue of the camping industry, as shorter trips may well result in lower trip expenditures. In addition, the average expenditure by both British Columbian residents and other Canadians has decreased steadily since the early 1980's. Average expenditure per camper night has decreased by 52 percent and 59 percent respectively.

Finally, one of the major effects of the overall decline in camping in British Columbia, the steady decline in the average expenditure per camper night and, perhaps, the shift from non-weekend to weekend camping trips was a loss of total gross revenues to the British Columbia campground industry. In 1990, the total gross revenue was nearly $126 million less than it was in 1980, a decrease of 49 percent. The affect of this loss on unemployment levels and loss of tax revenue to the Province is not known.

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Queen's Printer for British Columbia©
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